



Lync User Guide

Windows

May 2015

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Introduction



Microsoft Lync facilitates real-time, online communication and collaboration through instant messaging (IM) and Presence, which is an indicator of a user's availability to communicate.

Use Lync to collaborate with multiple contacts within the same IM, conduct multiple IMs at the same time, customize your Presence information, send and receive files via IM conversations, call a contact using your computer's audio, and share your desktop, program, or video with contacts.

The instructions that follow refer to Windows Lync 2013.

Starting Lync

Windows Lync users have the option to have Lync automatically start upon login.

1. If Lync initiates when you start your computer, close the program and establish your VPN connection.

If you do not want Lync to automatically start upon initial login to your computer, follow these steps:

1. With Lync open, click **Tools** | **Options** | **Personal**.
2. Uncheck **Automatically start Lync when I log on to Windows**

2. Launch Lync from your toolbar:

Lync Contacts

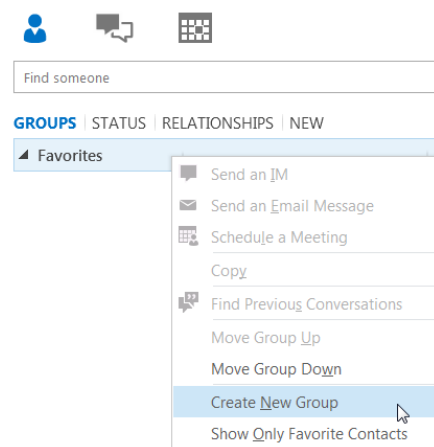
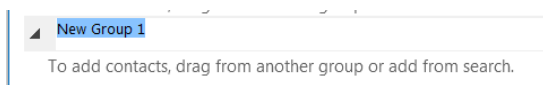
To locate a contact, use one of these methods:

- Click the Contact icon | Enter a name in the text box | Either press return, or click the magnifying glass icon .
- Alternatively, you can organize your contacts into groups (see below), allowing you to find someone with just a couple of clicks, rather than having to type in a name.

Create Groups

Create groups so that you can organize your contacts for easier viewing. It also allows you to quickly send individual or group messages. To create a group in Windows:

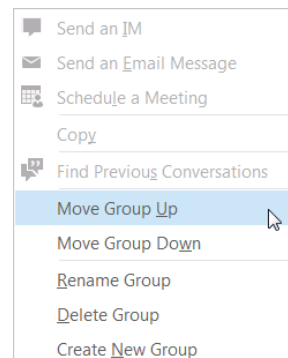
1. Click on the **Contact** icon | Right-click on one of the existing groups, such as Favorites | Select **Create New Group**, as shown at right.
2. When the new entry appears, give the group a meaningful name by typing in the blue text box, as shown below.



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3. Right-click on the group you just created to move the group up or down in the list. For example, you may want to put the list you use the most at the top.
4. Repeat these steps until you have created all your groups.

You are now ready to populate these groups with contacts. You can do this in various ways. See [Add Contacts to Lync Groups](#).



Add Contacts to Lync Groups

After you have created your groups, as described above, use one of the following methods to add contacts to these groups.

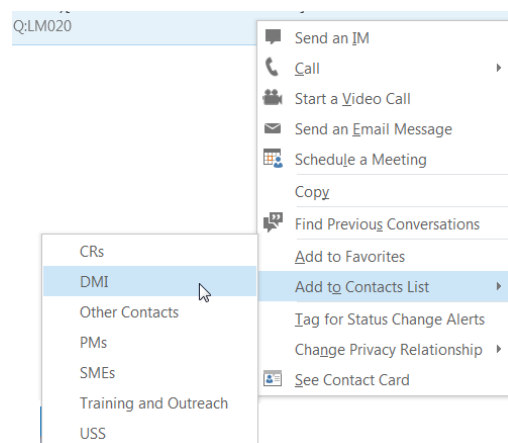
Method One: Right-Click, Move

Search for a contact and right-click on the name in the search results | Select **Move Contact To** | Select the group where you want the contact to reside.

Method Two: Search and Add

1. Search for a contact.
2. Right-click on the name in the search results | Choose **Add to Contacts List** | Select the group where you want the contact to reside.

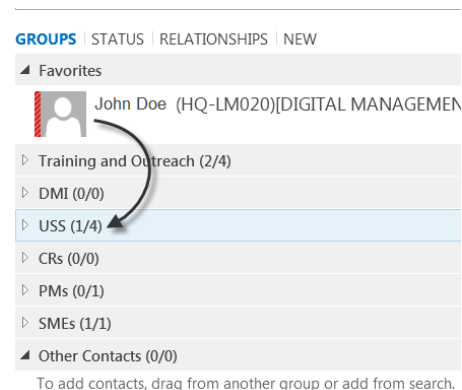
Alternatively, right-click | Choose **Add to Favorites**.



Method Three: Drag and Drop

Click on one of your existing contacts | Drag it to the group where you want it to reside.

In the example at the right, John Doe was added as a contact (**Add to Favorites**) and then dragged into one of the existing groups.



New Option

GROUPS | STATUS | RELATIONSHIPS | **NEW**

Click **New** to view the people who've added you as a contact. Their name appears here, allowing you to add them to your Contacts list to make sure they can contact you and see when you are available.

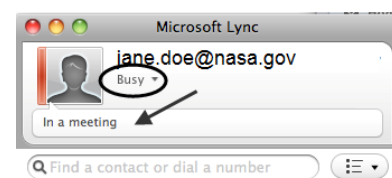
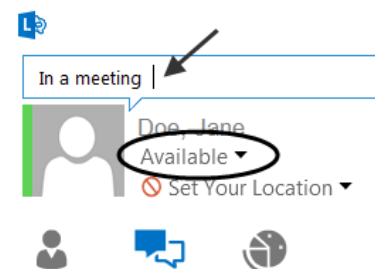
Availability Status in Lync

This section describes how to display your availability to others, and how to view the availability of others.

Indicate Your Status

Presence is a feature in Lync that indicates your availability to communicate with others. Indicate your status using any of these methods:

- When you schedule a meeting in your Outlook calendar, or are on a Lync call or video call, your status is automatically reflected in Lync.
- Use the Presence Status menu (shown at right) to select one of the following: Available, Busy, Do Not Disturb, Be Right Back, Off Work, Appear Away, Signed out.
- You can add additional information to the Presence status. In the example below, the Presence status indicates that Jane Doe is in a meeting.
 1. Place your cursor after the existing Presence status | Type your message, such as, “Will be free at 10:00.”
 2. Press enter.



Check a Contact's Status

Before communicating with a contact, you can check their availability to see if they are online, away, or unavailable.

Click **Status** to quickly see who is online, away, or unavailable.



In addition to the color-coded contact picture, as shown at right, a contact may indicate their availability by adding a message:



	Available
	Busy
	Offline
	Not Available

Create Status Alerts

If a contact is unavailable, you can be alerted when they become available. To do this, right-click on the contact | Select **Tag for Status Change Alerts**.

Control Information Access

With Lync you can manage how much presence information others see. To do this:

1. Click **Relationships**

GROUPS | STATUS | **RELATIONSHIPS** | NEW

2. Right-click on the contact | Select **Change Privacy Relationship** and then one of the following as appropriate:

Friends and Family	Share note, location, and all contact information except meeting details.
Workgroup	Share note, meeting location, and all contact information except Home and Other phone; contact can interrupt Do Not Disturb status.
Colleagues	Share note, location, and all contact information except Home, Other, and Mobile phone, and meeting details.
External Contacts	Share only name, title, e-mail address, company, and picture.
Blocked Contacts	Share only name and e-mail address, blocked contacts can't reach you via Lync.
Auto-assign Relationship	Reset this privacy relationship to the Lync default.

Lync Instant Messaging

Lync instant messaging (IM) is an efficient way to connect with your contacts in real time and on a moment's notice. It is less formal than e-mail and faster than a phone call. To send an IM, follow these steps:

1. Check to see if your contact is available. If they are available, their picture shows a green vertical bar, as shown at right. They will also have a label after their name saying, Available.
2. Do one of the following:
 - Hover over their picture | From the Quick Lync bar, click the **IM** button, shown at right.
 - Double-click anywhere on their contact listing.
 - Right-click their listing and select **Send an Instant Message**.
3. Type your message at the bottom of the conversation window, changing font, adding emoticons, and setting priority as desired | Press **Enter**.



Send IM to Several Contacts at Once

To send an IM to several people at the same time, do the following:


1. If the people you want to send the IM to:

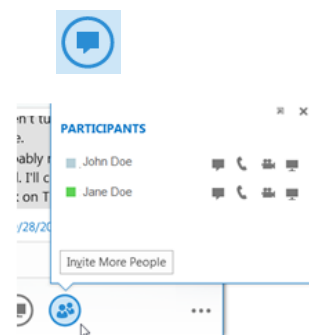
Appear as adjacent contacts in your Contacts list...	Press and hold the Shift key while you click the listing for each person.
Are not listed adjacently...	Press and hold the Ctrl key while you click them.

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2. Click the IM icon that appears next to the last contact you selected.
3. Type your message at the bottom of the conversation window | Press **Enter**.

Add Participants

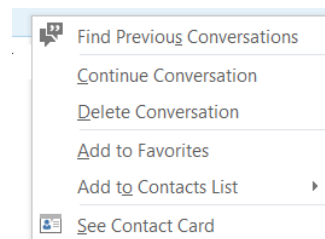
To add participants to your existing chat, click the **Invite More People** icon  | Select the person you wish to invite.



View Message History

Click the Conversations icon  to see a history of past instant message conversations.

If you right-click on a conversation, you are given a menu to perform various actions such as , Find Previous Conversations, Continue Conversation, Delete Conversation, Add to Favorites, Add to Contacts List, and See Contact Card.



Transfer Files


You can transfer files from peer to peer or with more than one person in a meeting room. Just drag and drop the file you want to share in the outgoing chat box. Alternatively, you can use the Insert File button in the Attachments view.

Make a Lync Call

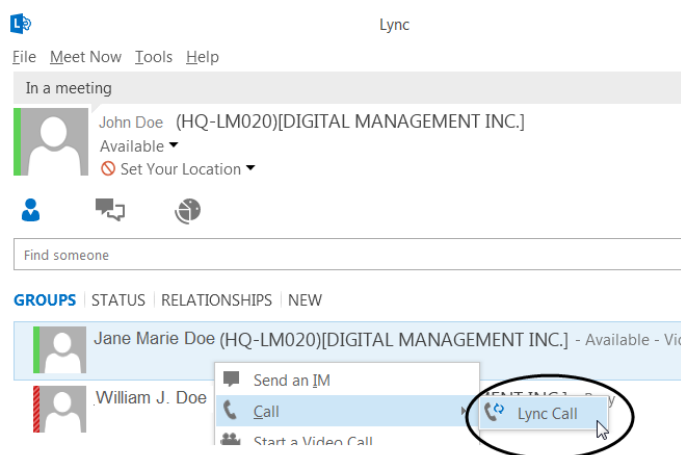
A Lync call is from your computer to someone else's computer who is also using Lync (computer audio).

Lync does not have the ability to make an outside call.

To initiate a Lync call:

1. Click the Contacts icon  and navigate to the contact you wish to call.
2. Right-click on their name and select **Call | Lync Call**, as shown at right.


Alternatively, double-click on their profile card | Click the call button in the chat window.



Meetings

When you create a meeting using Lync, you can check if you have any scheduled meetings, search for people, view their schedules, invite people to a meeting you are just about to start, as well as schedule a meeting for the future just as you can in Outlook. A meeting that you create in Lync appears on your calendar in Outlook. The meeting option functions differently in Windows and Macintosh. Lync meetings are limited to 199 participants. To create an online meeting, you must have a VTS standard seat, which you can request through the [Enterprise Service Desk \(ESD\)](#).

Check for Scheduled Meetings

To see if you have any meetings scheduled, click on the **Meetings** icon  and view the message:



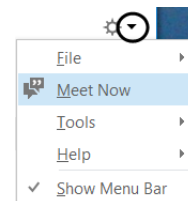
Send Invitation for Lync Meeting

The following sections detail the various methods to schedule Lync meetings and send invitations to attendees.

Invite Others to Join Your Instant Message Meeting

To send Lync invites for an IM meeting you are about to start:



1. Click the Options menu (circled at right) | Select **Meet Now**.
2. When the Conversation window appears, hover your cursor over the Invite **More People** icon (shown below) | Click **Invite More People**
3. Scroll through your contacts and select the correct one | Click **OK**.

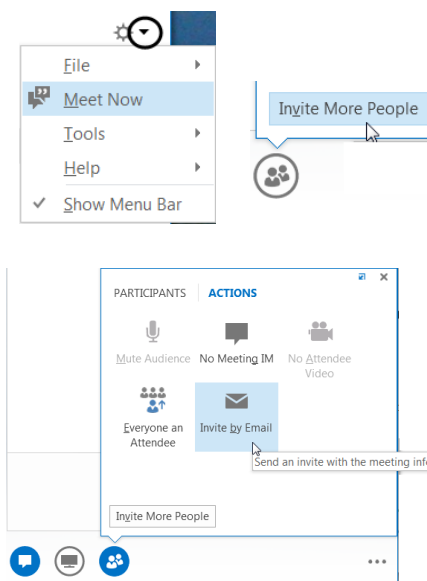
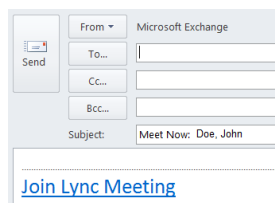


An invite is sent to that person and they are added to the conversation.

Send Outlook E-Mail Invites Using Lync

To send Outlook e-mail invites for a meeting using Lync:

1. Click the **Options** menu (circled at right) | Select **Meet Now**.
2. When the **Conversation** window appears, click the **Invite More People** icon  to activate it  | Hover your cursor over it and click **Invite by Email**.
3. When the new Outlook e-mail appears, invite appropriate attendees. For outside attendees, enter their e-mail address.



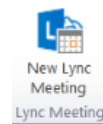
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To invite more than 15 internal people, or an outside person, you must have a VTS standard seat, which you can request through the [Enterprise Service Desk \(ESD\)](#).

4. Enter the **Subject** text | **Starts** date and time | **Ends** date and time | Click **Send**.

Send Outlook E-Mail Invites Using Outlook Calendar

To send Outlook e-mail invites for a Lync meeting using Outlook Calendar:



1. From your Calendar in Outlook, on the **Home** tab, click **New Lync Meeting** (shown right)

If you don't see the **New Lync Meeting** icon and link, click **File** | **Options** | **Add-Ins**. At the bottom, from the **Manage:** menu, select **COM Add-ins** | Click **Go...** Check the box next to **Lync Meeting Add-in for Microsoft Office 2013** | Click **OK**. If you still do not see the **New Lync Meeting** icon, call the [Enterprise Service Desk \(ESD\)](#).

A Lync 2013 Web Conferencing Meeting window displays containing a link for the participants to join your Lync Meeting. The location defaults to Lync Meeting.

2. Invite appropriate attendees. For outside attendees, enter their e-mail address.

To invite an outside person, you must have a VTS standard seat, which you can request through the [Enterprise Service Desk \(ESD\)](#).

3. Enter the **Subject** text | **Starts** date and time | **Ends** date and time.
4. Indicate any [Lync Web Conferencing Options](#) as necessary | Click **Send**.

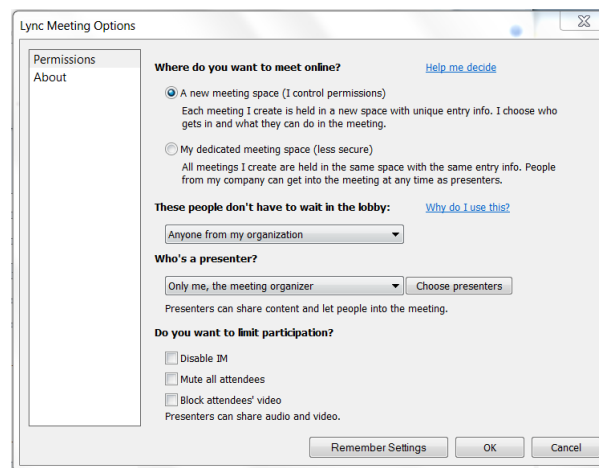
Lync Web Conferencing Options

For Lync Web Conference options:

1. Click **Meeting Options** at the top in the **Lync Meeting** group.
2. Under the **Where do you want to meet online?** Section, the first option is selected by default:

Select **A new meeting space (I control permissions)** to use a unique meeting space each time with unique information, to limit participants to only those invited, and to control what access the participants have.

Do not change this setting.



3. From the **These people don't have to wait in the lobby:** menu, indicate who gets into the meeting directly, and who waits until you let them in.

Who gets in directly?	What happens?	Recommended when...
Only me, the meeting organizer	You are the only one who gets into the meeting directly. Everyone else has to wait until admitted.	You have a high security meeting and confidential information.
People I invite from my company	Only people invited can join the meeting directly. Everyone else has to wait until admitted.	You are discussing confidential information, and want only specific people to join.
Anyone from my organization	Anyone from NASA can get in to the meeting directly, even if not invited.	You do not have external participants and you are not discussing confidential information.
Anyone (no restrictions)	Anyone who has access to the meeting link gets in to the meeting directly.	You are inviting outside participants and you are not discussing confidential information.


It is best practice to always check these settings to ensure the meeting has the appropriate security. If you have a question about the appropriate security for your meeting, contact the Center Information Security Officer (CISO). For more information, visit <http://itcd.hq.nasa.gov/itsecurity/it-security.html>.








4. From the **Who's a presenter?** menu, indicate who can present in your meeting. All presenters have full control over the meeting and can share content, change the meeting options, mute people, and so on.

Who's a presenter?	What happens?	Recommended when...
Only me, the meeting organizer	Only you as the meeting organizer have presenter permissions.	Use when the participants do not have to interact with the meeting content. You can designate additional presenters during the meeting
Anyone from my organization	Anyone from your company can be a presenter.	Suitable for causal meetings with your teammates, where all participants can share and modify content.
Anyone (no restrictions)	Everyone you invite can be a presenter.	Use when you have external participants and want them to present.
People I choose	You and the people you choose can be a presenter.	Use when you want specific people to be presenters.

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IMPORTANT: When you select People I choose, click Choose Presenters, and then move the participants from the Attendee side to the Presenters side. External invitees and distribution lists cannot be added as presenters, but you can grant presenter permission to individuals when you are in the meeting.


5. The **Do you want to limit participation** section is for when you are setting up a large event and want to eliminate interruption:
- Disable IM
 - Mute all attendees
 - Block attendees' video (Video in Lync Web Conferencing is not supported at NASA).
6. Set the remaining options as appropriate and click **Send** .

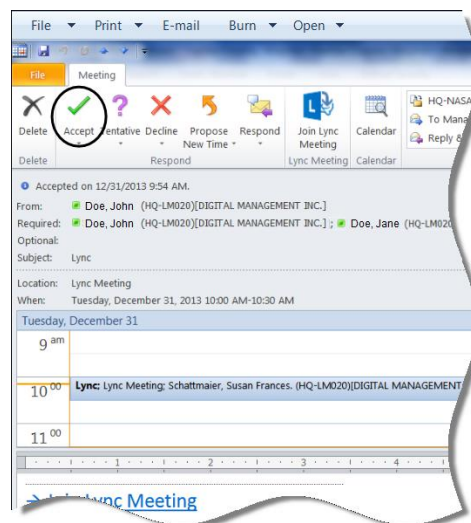
Icon	Description
	Use the Reminder menu to set a reminder for this meeting.
	Make this meeting recurring.
	Show time zone options
	Request that attendees indicate whether they plan to attend or not.
	Check Names icon: Verify names and address you typed to make sure you can send messages to them.
	Categorize icon: Assign to a category: Family, friends, holiday, junk, Manager, Networking, Personal, Red Category, and Team Travel. You can also add a new category, or edit an existing category.
	Private icon: Hide the contents of this meeting from others.

Lync Meeting Invite

When you receive a Lync meeting invite, click **Accept**. It now appears on your Outlook calendar.

At the time of your Lync meeting, you can access the meeting invitation using one of these methods:

- From the Outlook Calendar meeting, in the **Notes** section, click the **Join Lync Meeting** link. → [Join Lync Meeting](#)
- In Lync, click on the calendar icon  | Double-click the appointment.



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Join a Lync Meeting

When joining a Lync Meeting, you can use a NASA computer with Lync installed, or a non-NASA computer without Lync using Outlook Webmail.

The meeting login steps vary depending on how the host set the options, and your participation in the meeting. You may be admitted directly to the meeting, or you may be prompted to log in to the meeting via the Web app.

Follow the steps for your situation:

- [Join Meeting as NASA Employee Using NASA-Issued Computer](#)
- [Join Meeting as NASA Employee Using Non-NASA Computer](#)
- [Join Meeting as Guest Using Non-NASA Computer](#)

NASA Employee Using NASA-Issued Computer

This is the recommended method for joining a meeting if you are a NASA employee with your NASA-Issued Windows computer.

1. In the Calendar section of Outlook, open the e-mail meeting invitation.
2. Click the **Join Lync Meeting** link in the meeting window. [→ Join Lync Meeting](#)
3. When the Privacy Disclaimer for NASA Lync displays, click the checkbox next to **I have read the above and agree to the terms** | Click **Continue**.

NASA Employee Using Non-NASA Computer

This method is preferred if you are an organizer or attendee who works at NASA and are without your NASA-issued laptop. To log in with the Lync Web App internet interface:

1. Connect remotely using [Secure Nomadic Access \(SNA\)](#) | Log into [Outlook Web Access \(OWA\)](#).
2. View the Calendar and open the e-mail meeting invitation | Click the **Join Lync Meeting** link in the meeting window. [→ Join Lync Meeting](#)

3. When the Microsoft Lync Web App login Web page appears, click **Sign in if you are from the organizer's company**.

4. In the **User name** field, enter the NASA network domain followed by your Agency User ID, as in the example: NDC\jdoe.
5. In the **Password** field, enter your password.
6. Click **Join the meeting**.

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7. The first time you use Lync Web App, you are prompted to load a plug-in. Complete the download of the LWA Plugin64BitInstaller64 plugin.

Subsequent logins do not require you to download the plug-in. Just click **Allow**.

8. Click the checkbox next to **I have read the above and agree to the terms** | Click **Continue**.

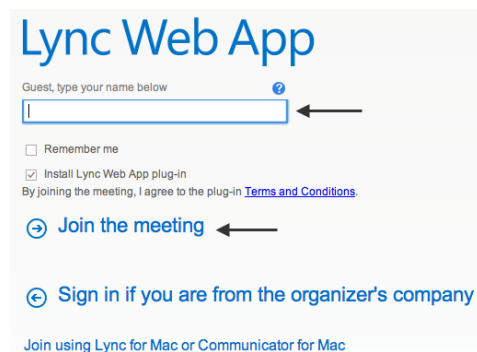
Guest Using Non-NASA Computer

Only non-NASA people should be using this option. If you log in as a guest, you are considered external to NASA and do not have the rights and privileges available to you if you were logged in using NASA credentials. To log in as a guest:

1. In your e-mail application, open the meeting invitation and click the **Join Lync Meeting** link.
2. The first time you use Lync Web App, you are prompted to load a plug-in. Complete the download of the LWA Plugin64BitInstaller64 plugin.

Subsequent logins do not require you to download the plug-in. Just click **Allow**.

3. After you've entered your name in the **Guest** field, click **Join the meeting**
4. When the Privacy Disclaimer displays, click the box next to **I have read the above and agree to the terms** | Click **Continue**.





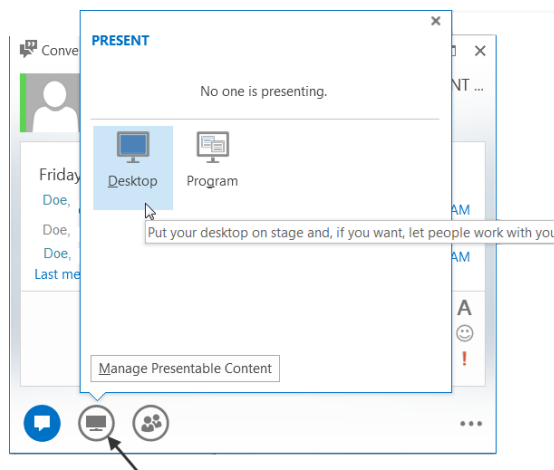
Presenting in a Lync Meeting Room

Use Lync to share your desktop or a program with contacts. Lync meetings are limited to 15 internal people without a VTS seat, or up to 199 internal or external participants with a VTS seat via a secure https Internet connection. To request a VTS standard seat, contact the [Enterprise Service Desk \(ESD\)](#). If you have more than 199 participants, Lync can support up to 1000 participants if you have elevated rights, which can be given on a meeting by meeting basis. To request elevated privileges for your meeting, submit a Service Request.

Share Desktop

To share your desktop while in a conversation, follow these steps:

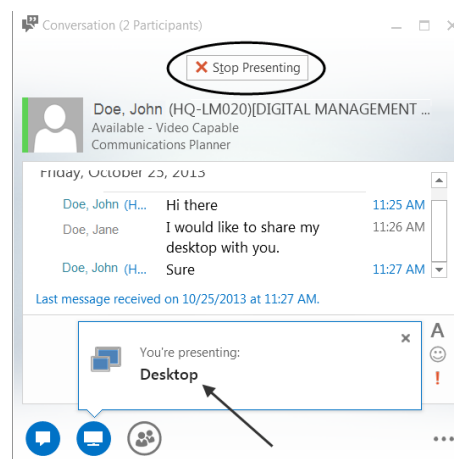
1. Click the Monitor icon  located at the bottom of the **Conversation** window.
2. When the **Present** window appears, click the **Desktop** icon . If you have more than one monitor, you will have the choice of selecting **Primary Monitor**, **Secondary Monitor**, or **All Monitors**.
3. When a message appears informing you that people will be able to see everything on your screen, click **OK**.



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4. The other attendees can now see your desktop.
5. To stop sharing your desktop, click **Stop Presenting**, as shown at right.

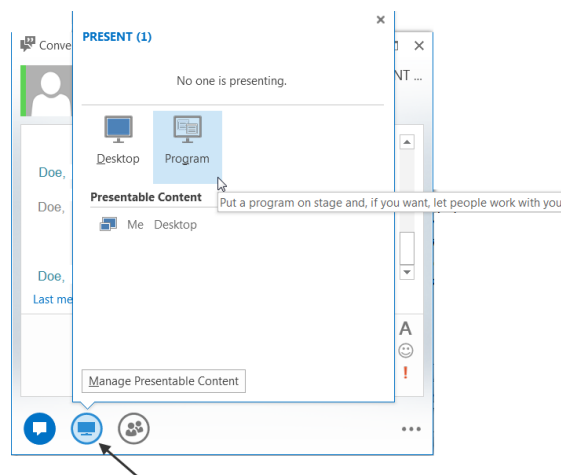
This returns you to your conversation.



Share Application

You can share an application only if the application sharing session is initiated from a Windows computer. You must also have the application open before you start. To share an application while in a conversation, follow these steps:

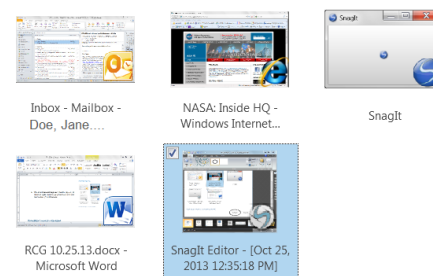
1. Open the application you would like to share. E.g., PowerPoint.
2. Click the Monitor icon  located at the bottom of the **Conversation** window.
3. When the **Present** window appears, click the **Program** icon .



4. When the **Present Programs** window appears, as shown at right, select the program that you would like to share | Click **Present**.
5. When a message appears informing you that people will be able to see all the open windows of the program you chose, click **OK**.
6. To stop sharing your application, click the **Stop Presenting** button at the top of the conversation window. This returns you to your Conversation.

 Stop Presenting

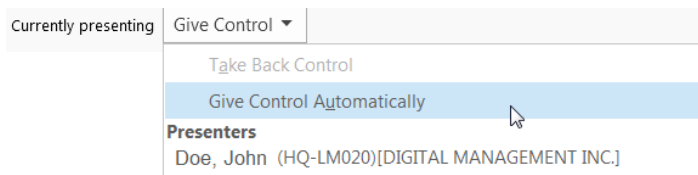
Present Programs




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Give and Take Control When Sharing

Use the presentation toolbar at the top to share control of your desktop or application with another meeting participant. When you give control to another person, they can move the mouse in the presentation window, click on windows they have access to, and type in applications or documents that you are sharing with them.



To:	Steps
Give Control	From the Presentation tool bar, click the Give Control menu Select Give Control Automatically .
Take Back Control	From the Presentation tool bar, click the Give Control menu Select Take Back Control. Alternatively, press Ctrl+Alt+Space.
Request Control	Click Request Control : 
Release Control	Click Release Control : 

For information regarding obtaining a Lync Web conferencing account, contact the NASA [Enterprise Service Desk \(ESD\)](#) at (202) 358-HELP (4357) | Toll free: 1-866-4NASAHQ (462-7247).

Lync Video

The Lync video functionality is available for Lync calls and messaging. To use video during a conference, you must have an account.

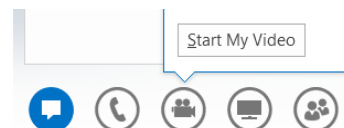
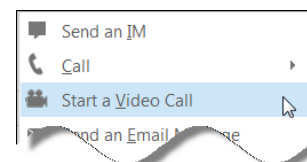
Lync Video

1. There are a number of ways to initiate a Lync video chat in Windows:


- Right-click on a contact name and select **Start a Video Call**.
- Click once on or hover over a contact picture | Click the Start a video call icon:



- Double click on a contact name | Click the Start My Video icon:

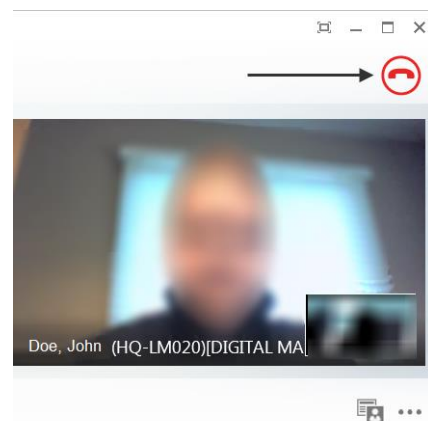


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2. To end your video chat, click the red phone icon .

For additional Lync documentation, visit:

<http://nomadinternal.nasa.gov/nomad/documentation.html>



For assistance, contact the Enterprise Service Desk (ESD): Submit a ticket online at esd.nasa.gov, or call 358-HELP (4357) or 1-866-4NASAHQ (462-7247).

This document is posted on the ITCD Web site at:
<http://itcd.hq.nasa.gov/instructions.html>